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25 July 2006

Portfolio Process Cycle – Next Steps until 31 August 2006

Introduction

We have concluded the Ideas Management phase of this year's portfolio process cycle. MPT and PPT Leaders are creating project templates in SYPOS for all PLT supported new project proposals. Together with the existing ongoing projects they will constitute the set of projects that will need our full attention in the coming weeks.

The project templates in SYPOS will comprise only minimal information. The missing information should be completed between now and **31 August 2006**. By the same deadline, the data for all existing projects should have been updated. In summary, the following planning activities should be accomplished by then:

Update project, business case and task data, i.e.

- **Add missing data, i.e. missing project attributes and business cases**
- **Check and, if necessary, modify business case assumptions and data**
- **Update project milestones**
- **Update multi-year resources and key dates for ongoing tasks**
- **Update task status and requirement flags**
- **Properly close existing projects and tasks, which are either completed or need to be terminated for other reasons**



Details

Details related to these activities can be found here:

Double click on icon to open.

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Important Changes in Planning Principles and Points to Remember

Task Planning

We have a **major change in the planning of Field Development tasks** this year for those of you who use FPLS. In contrast to last year, the data upload from FPLS into SYPOS is stopped until early next year in order to prevent the overwriting of planned resource estimates in SYPOS with incomplete FPLS data. The download of task data from SYPOS into FPLS will continue as before, allowing you to plan the trial details for 2007 in FPLS as usual. Early next year, we will replace the SYPOS plan figures for 2007 with the corresponding FPLS data, assuming that the planning in FPLS for the 2007 season is complete by then.

Tasks planned for **Stewardship** projects will require a **Task Justification** if the total costs exceed 100 \$k.

A **Task Driver** needs to be assigned to all tasks for **AI Maintenance** and **Stewardship** projects.

Business Cases

Remember, a **Business Justification** is needed for projects with total cost <250 \$k; a SYPOS business case is needed for all others.

In order to develop a business case, you may still want to use the EXCEL tool distributed by CP Finance. However, the data for the most likely case will have to be transferred to SYPOS by the **Product Managers** themselves, as no additional staff within P&PM will be available to perform this task.

2006 Portfolio Planning Cycle Overview



The portfolio planning cycle in 2006 for the Development project portfolio 2007 is summarized here: Double click on icon to open. Please note that the deadlines listed may be subject to change due to circumstances outside our control. All such changes will be announced separately.

In the sections below, I have listed the key responsibilities of MPTs¹, PPTs², Project Managers, Product Managers³ and Regulatory Affairs Managers in this planning phase. These responsibilities reflect the principles for managing AI development projects by MPTs or PLCM⁴ projects by PPTs. You may want to use one of the following links to jump directly to your section of choice in this document:

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Responsibilities of MPTs, PPTs, Project Managers, Product Managers, Regulatory Affairs Managers and Managers of Stewardship Projects

In the sections to follow, there is a separate table for each of the groups mentioned in the title, listing the key activities to be performed between now and the end of the Project Planning and Consolidation phase on 31 August 2006. For further distribution you may want to copy the appropriate table into a separate Word file, together with the Help and Support table, which can be found at the end of this document.

¹ MPT: Multi Functional Program Team

² PPT: Project Portfolio Team

³ Or equivalent role in Regions and Countries

⁴ PLCM: Product Life Cycle Management

Multi Functional Program Teams (MPTs), Project Portfolio Teams (PPT)

Activity No.	Activity Description	Remarks
1	Seek regional proposals for project managers of regional and country projects.	Proposal: send out project lists and ask regional Development Head to amend list with names.
2	Confirm project managers of regional and country projects.	
3	Assign project managers for global projects.	
4	Inform all project managers on their assignment and responsibilities.	
5	Periodically check progress of project planning for all projects in the MPT/PPT/PLT ⁵ portfolio	

MPT and PPT Leaders

New projects		
Activity No.	Activity Description	Remarks
1	Create all PLT supported new projects in SYPOS, regardless of the project scope: General Project Info, including AI/Traits, A-Numbers, Countries, Sympact Crops, and Ideas.	Regions and Countries do not create their own projects (except NAFTA). NAFTA DPLs ⁶ will create the new regional projects.

⁵ PLT: Product Leadership Team (Marketing)

⁶ DPL: Development Project Leader

Managers of global projects


New projects		
Activity No.	Activity Description	Remarks
1	In collaboration with Product Managers, elaborate draft project structures in SYPOS. Assign Global Strategic Program attributes to projects, in agreement with PLTs.	Family members need to be of the same project type and inherit the rank group of the root project.
2	Together with managers of regional projects, agree on final project structure for regional projects, and if required, modify existing draft structure.	Negotiate with managers of regional projects on a project structure satisfying both, global and regional needs.
3	Define key milestones for own projects and enter in SYPOS.	
4	In collaboration with Functional Expert Networks, define for own projects the detailed work programs for the entire duration of the projects, and create the corresponding tasks in SYPOS. In particular, create summary tasks for Field Development activities.	Task lists for planning year and planning year+1 need to be complete. For subsequent years enter major tasks, as far as already known. Enter resource estimates for all Field Development tasks as there will be no data upload from FPLS.
5	Ensure that own projects have a business case of the correct type and that R&D cost data (Development tasks) in the business case is complete.	Business cases are owned and entered into SYPOS by Global Product Managers. Provide estimates for missing R&D cost data for project years 3 and following to the Product Manager.
6	Use checklist to ensure that all planning conditions are met.	 Checklist.doc Double click on icon to open

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Existing ongoing projects		
Activity No.	Activity Description	Remarks
1	Review General Project Info and Portfolio Process Info for own projects and if required, update.	In particular, update names of Project Manager and Project Owner.
2	Review task list for own projects and update General Task Info, Resources and Dates for ongoing tasks.	
3	Create missing tasks, with focus on planning year and planning year+1.	
4	Ensure that business cases for own projects are updated and missing business cases are created in SYPOS.	
5	Use checklist to ensure that all planning conditions are met.	<u>Checklist</u>
Projects terminated or completed in 2006		
Activity No.	Activity Description	Remarks
1	Properly close own terminated or completed projects and all tasks.	In particular, de-link projects from project families.

Managers of regional projects


New projects		
Activity No.	Activity Description	Remarks
1	Do not create projects in SYPOS.	Regions do not create their own projects (except NAFTA). MPT and PPT Leaders will set up templates for all PLT supported projects in SYPOS. You will have to complete project info, add milestones, plan all tasks including resources, and ensure that projects do have a business case.
2	Together with MPT and PPT Leaders, agree on final project structure for regional projects, and if required, modify existing draft structure.	Negotiate with MPT and PPT Leaders on a project structure satisfying global, regional and key country needs.
3	Define key milestones for own projects and enter in SYPOS.	
4	In collaboration with Functional Expert Networks, define for own projects the detailed work programs for the entire duration of the projects, and create the corresponding tasks in SYPOS. In particular, create summary tasks for Field Development activities.	Task lists for planning year and planning year+1 need to be complete. For subsequent years enter major tasks, as far as already known. Enter resource estimates for all Field Development tasks as there will be no data upload from FPLS.
5	Ensure that own projects have a business case of the correct type and that R&D cost data (Development tasks) in the business case is complete.	Business cases are owned and entered into SYPOS by regional Product Managers or equivalent role.
6	Use checklist to ensure that all planning conditions are met.	 Checklist.doc Double click on icon to open


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Existing ongoing projects		
Activity No.	Activity Description	Remarks
1	Review General Project Info and Portfolio Process Info for own projects and if required, update.	
2	Review task list for own projects and update General Task Info, Resources and Dates for ongoing tasks.	
3	Create missing tasks, with focus on planning year and planning year+1.	
4	Ensure that business cases for own projects are updated and missing business cases are created in SYPOS.	Business cases are owned and updated in SYPOS by regional Product Managers or equivalent role.
5	Use checklist to ensure that all planning conditions are met.	<u>Checklist</u>
Projects terminated or completed in 2006		
Activity No.	Activity Description	Remarks
1	Properly close own terminated or completed projects and all tasks.	


Managers of country projects

New projects		
Activity No.	Activity Description	Remarks
1	Do not create projects in SYPOS.	Countries do not create their own projects. MPT and PPT Leaders will set up templates for all PLT supported projects in SYPOS. You will have to complete project info, add milestones, plan all tasks including resources, and ensure that projects do have a business case.
2	Define key milestones for own projects and enter in SYPOS.	

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3	In collaboration with Functional Expert Networks, define for own projects the detailed work programs for the entire duration of the projects, and create the corresponding tasks in SYPOS. In particular, create summary tasks for Field Development activities.	Task lists for planning year and planning year+1 need to be complete. For subsequent years enter major tasks, as far as already known. Enter resource estimates for all Field Development tasks as there will be no data upload from FPLS.
4	Ensure that own projects have a business case of the correct type and that R&D cost data (Development tasks) in the business case is complete.	Business cases are owned and entered into SYPOS by country Product Managers or equivalent role.
5	Use checklist to ensure that all planning conditions are met.	 Checklist.doc Double click on icon to open
Existing ongoing projects		
Activity No.	Activity Description	Remarks
1	Review General Project Info and Portfolio Process Info for own projects and if required, update.	
2	Review task list for own projects and update General Task Info, Resources and Dates for ongoing tasks.	
3	Create missing tasks, with focus on planning year and planning year+1.	
4	Ensure that business cases for own projects are updated and missing business cases are created in SYPOS.	Business cases are owned and updated in SYPOS by country Product Managers or equivalent role.
5	Use checklist to ensure that all planning conditions are met.	<u>Checklist</u>
Projects terminated or completed in 2006		
Activity No.	Activity Description	Remarks
1	Properly close own terminated or completed projects and all tasks.	

Managers of functional projects (Multi-AI/Multi-Formulation, Non-AI)

New projects		
Activity No.	Activity Description	Remarks
1	Do not create projects in SYPOS.	Functions do not create their own projects. P&PM staff will set up project templates in SYPOS, based on special request. You will have to complete project info, add milestones, plan all tasks including resources, and ensure that projects do have a business case, if required
2	Define key milestones for own projects and enter in SYPOS.	
3	Define for own projects the detailed work programs for the entire duration of the projects, and create the corresponding tasks in SYPOS.	Task lists for planning year and planning year+1 need to be complete. For subsequent years enter major tasks, as far as already known.
4	Ensure that own projects have a business sponsor and if required, a business case of the correct type.	
5	Use checklist to ensure that all planning conditions are met.	 Checklist.doc Double click on icon to open

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Existing ongoing projects		
Activity No.	Activity Description	Remarks
1	Review General Project Info and Portfolio Process Info for own projects and if required, update.	
2	Review task list for own projects and update General Task Info, Resources and Dates for ongoing tasks.	
3	Create missing tasks, with focus on planning year and planning year+1.	
4	Use checklist to ensure that all planning conditions are met.	<u>Checklist</u>

Product Managers (see column "Remarks" for specification of Global, Regional, Country)



New projects		
Activity No.	Activity Description	Remarks
1	Develop business cases for new regional or country projects and enter in SYPOS (unless otherwise communicated by global Product Manager).	Regional or country Product Managers ⁷ , only. Select correct type of business case, depending on the total resource amount planned for a project.
2	In collaboration with regional and country Product Managers, develop business cases for new global projects, using the offline EXCEL tool or directly in SYPOS.	Global Product Managers, only. Select correct type of business case, depending on the total resource amount planned for a project.
3	In case the offline EXCEL tool was used, ensure timely data transfer into SYPOS.	Global Product Managers, only
4	Set "Complete" flag in SYPOS for all business cases, including regional and country ones.	Global Product Managers, only
5	Use checklist to ensure that all planning conditions are met.	 Checklist.doc Double click on icon to open

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⁷ Or equivalent role in Regions or Countries

Existing ongoing projects		
Activity No.	Activity Description	Remarks
1	Review and update existing business cases; add missing business cases.	All Product Managers. Select correct type of business case, depending on the total resource amount planned for a project (refer to the <u>Checklist</u> for guidance). In particular, add missing data for 2016 to existing business cases.
2	Set "Complete" flag in SYPOS for all business cases, including regional and country ones.	Global Product Managers, only
3	Use checklist to ensure that all planning conditions are met.	<u>Checklist</u>
Global AI Cost Consolidation		
1	Enter missing Global AI cost into SYPOS.	Global Product Managers, only
2	Review and if necessary, update existing Global AI cost data in SYPOS	Global Product Managers, only

Regulatory Affairs Managers (see column "Remarks" for specification of Global, Regional, Country)

AI Maintenance Projects		
Activity No.	Activity Description	Remarks
1	Review task list for global AI Maintenance projects and update General Task Info, Resources and Dates for ongoing tasks.	Global Regulatory Affairs Managers, only
2	Review task list for regional AI/Product Maintenance sub-projects and update General Task Info, Resources and Dates for ongoing tasks.	Regional Regulatory Affairs Managers, only.
3	Create missing tasks, with focus on planning year and planning year+1.	Global and Regional Regulatory Affairs Managers
4	Enter task justification in SYPOS for all studies >100 USD 1000.	Global and Regional Regulatory Affairs Managers
5	Properly close tasks, which were terminated or completed in 2006.	Global and Regional Regulatory Affairs Managers
6	Use checklist to ensure that all planning conditions are met.	 <small>Checklist.doc</small> Double click on icon to open


Managers of Stewardship Projects

Stewardship Projects		
Activity No.	Activity Description	Remarks
1	Review task list for Stewardship projects and update General Task Info, Resources and Dates for ongoing tasks.	
2	Check "Customer" and make sure that the right customer is selected.	Most stewardship tasks are to be charged to customer "Marketing & Sales", as they are not a Development activity according to International Accounting Standards.
3	Inform study sponsor in Marketing & Sales on tasks to be charged to them and ensure that corresponding external funds (if required) are properly budgeted by the study sponsor	
4	Create missing tasks, with focus on planning year and planning year+1.	
5	Enter task justification in SYPOS for all studies >100 USD 1000.	
6	Properly close tasks, which were terminated or completed in 2006.	
7	Use checklist to ensure that all planning conditions are met.	 Checklist.doc Double click on icon to open

Help and Support

Portfolio Process, Project Management				
Topic	Region	Last Name	First Name	Phone
MPTs, PPTs, global portfolio process	Global	Barnes	Jasper	+41 79 619 1310
		Lanter	Franz	+41 79 248 6659
Regional sub-processes	APAC	Ng	MunJoo	+65 67995611
	EAME	Weber	Hans	+41 61 323 6202
	LATAM	Boscolo	Patricia	+55 11 56433925
	NAFTA	Drost	Dirk	+1 336 632 7510
SYPOS business case	All, except NAFTA	Lanter	Franz	+41 79 248 6659
	NAFTA	Drost	Dirk	+1 336 632 7510
SYPOS field development planning	All, except EAME and NAFTA	Kelly	Tim	+41 61 323 5357
	EAME	Stehli	Andreas	+41 61 323 8069
	NAFTA	Hubbard	Lee	+1 336 632 7034
FPLS field development planning	Global	Baldarelli	Philipe	+41 61 323 5797
Project creation and structure	Global	MPT and PPT Leaders (P&PM ⁸)		
HA & ES ways-of-working and planning	Global	Kelly	Tim	+41 61 323 5357
	Jealott's Hill, Alderley Park	Warburton	Jude	+44 1625 515459
	NAFTA	Hertl	Peter	+1 336 632 6483
GS T&P ways-of-working and planning	Global	Heimgartner	Caroline	+41 61 323 5124
	NAFTA	Garner	Steve	+1 336 632 2006
R+T ways-of-working and planning	Global	Russell	Adam	+44 1344 414902
		Kissling	Martin	+41 61 323 8010

⁸ P&PM: Programme and Portfolio Management, CP Development. Head: Jasper Barnes

Program and Project Specific Information				
Crop Protection				
PPTs		 PPTs March 2006 Double click on icon to open		
Managers of Regional and Country projects		Look up directly in SYPOS		
MPT Mandipropamid (NOA 446510)		Dieterle	Roland Mario	+41 61 323 2125
Fruit & Vegetable Initiative		Dieterle	Roland Mario	+41 61 323 2125
MPT OPAs		Wright	Tanya	+41 61 323 1275
MPT Zariva		Molitor	Elvira	+41 61 323 8328

Program and Project Specific Information				
Professional Products				
All PP projects, except Seed Care		Kelly	Tim	+41 61 323 5357
PP Projects Seed Care		Hansen	Anette	+41 61 323 5724


SYPOS Tool				
Topic	Region	Last Name	First Name	Phone
Technical SYPOS access problems		Your local IS help desk		
SYPOS error messages	All, except NAFTA	Lanter	Franz	+41 61 323 6232
	NAFTA	Hubbard	Lee	+1 336 632 7034
SYPOS performance	Global	Schmutz	Lukas	+41 61 323 6253
SYPOS system manager	Global	Lanter	Franz	+41 61 323 62 32
	NAFTA	Hubbard	Lee	+1 336 632 7034
SYPOS access rights	All, except NAFTA	Born	Simone	+41 61 323 1108
	NAFTA	Hubbard	Lee	+1 336 632 7034
SYPOS functionality		SYPOS online Help documents: click on the  icon in the top right-hand corner of each screen		

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Local SYPOS champions	APAC	Ng	MunJoo	+65 67995611
	EAME	Stehli	Andreas	+41 61 3238069
		Allen	James	+41 61 323 5493
	LATAM	Boscolo	Patricia	+55 11 56433925
	NAFTA	Payan	Luis	+1 336 632-6842
		Carmean	Kurt	+1 336 632 2133
		Hubbard	Lee	+1 336 632 7034
		Yoder	Joseph Floyd	+1 336 632 2209
		Wilhite	Faye	+1 336 632 7303